Verifying a Vendor

It is critical to check to see if a vendor is already in CHRIS before duplicating an entry. Search under different possibilities before you conclude that the vendor is not there. For commonly used vendors and vendor codes, such as USDA, refer to Appendix G.

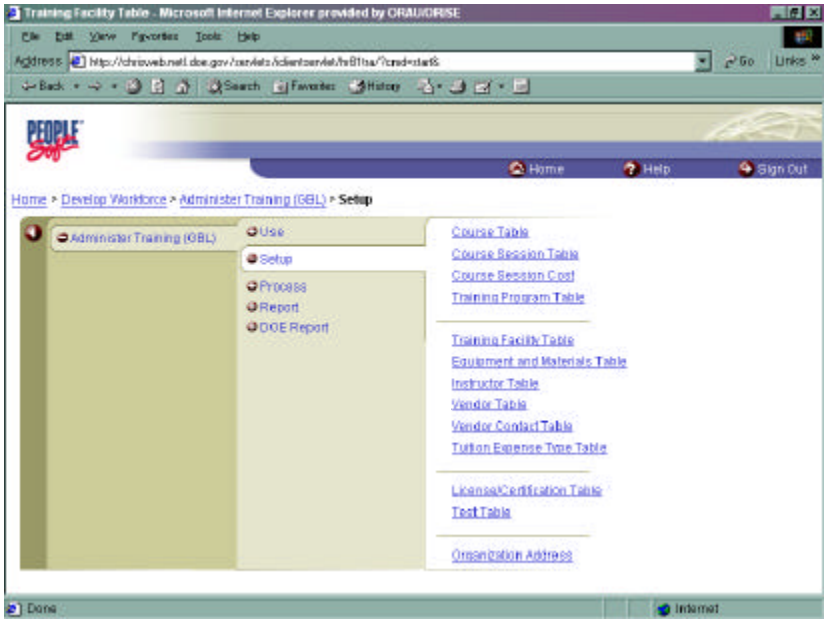
Vendor Information

BUSINESS RULE

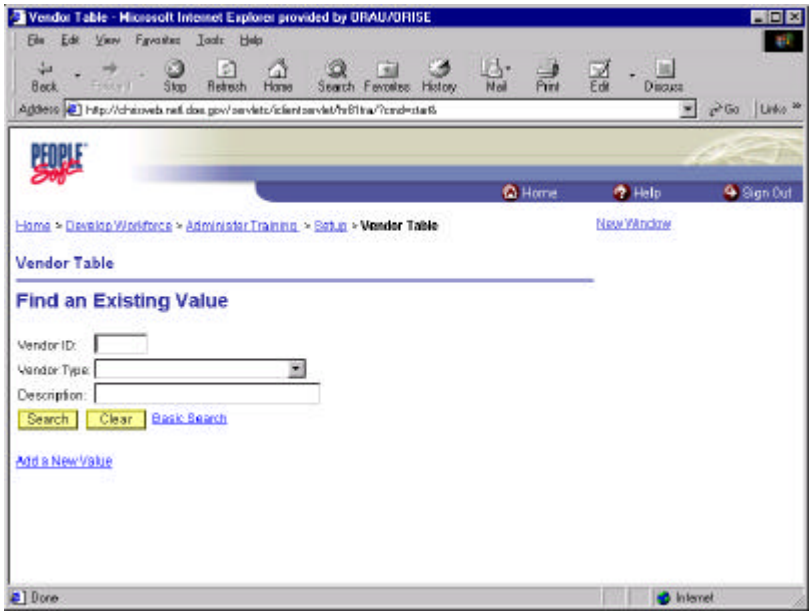
National and multinational vendors may have numerous locations with different contact points. The vendor is entered only once in the Vendor Table. The different sites and contacts are reflected in the Vendor Contact Table. If a vendor is already entered into the system, you may add additional contacts.

To verify that a vendor is in CHRIS:

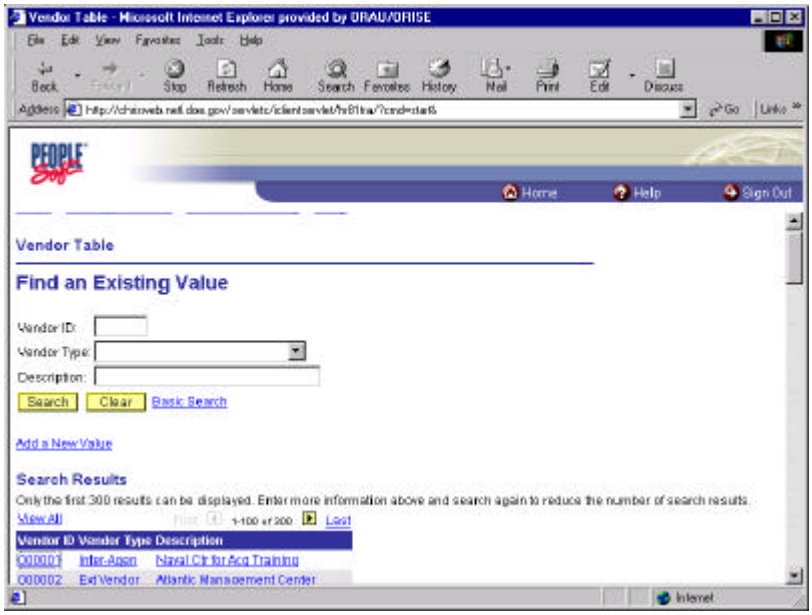
1. At the "Home" screen, click on "Develop Workforce."
2. Click on "Administer Training (GBL)."
3. Click on "Setup."
4. Click on "Vendor Table."



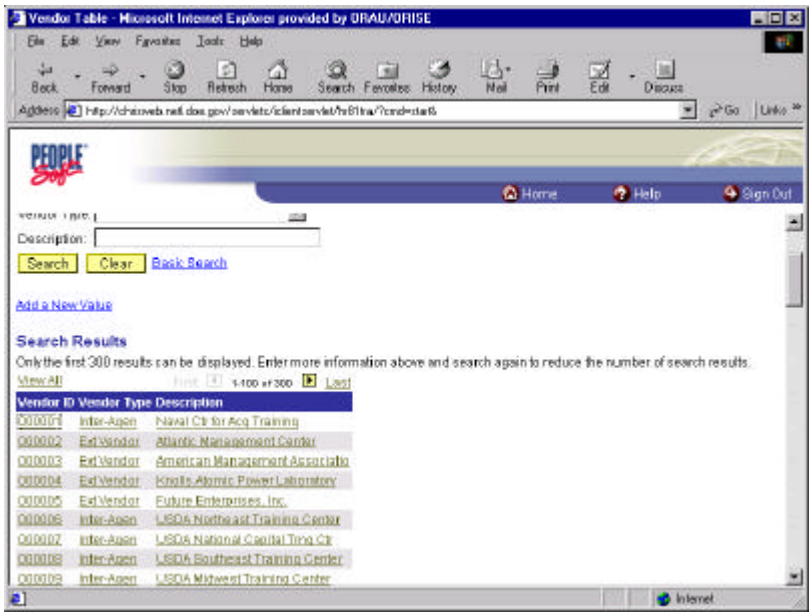
The "Vendor Table" screen is displayed.



5. Click on the "Search" button.



A list of existing vendors is displayed. Click "View All."



6. Scroll and check if the vendor you need is on the list.

Note: This list is not in alphabetical order. To see the listing in alphabetical order, enter a "%" sign in the description field and click on the "Search" button. Search for a vendor by entering a name in the "Description Field" and then click the "Search" button.

Note: When the scroll bar appears, more vendors are listed than can be displayed on the screen.

Note: There is a numeric code identified in the "Vendor" column that is associated with each vendor. It is on the left side of this listing. As with the facilities, this number is generated by CHRIS when a vendor is added to the database. If you use several vendors regularly, make a reference guide so you can simply key-in the vendor's number.

Preferred Vendor Search Tips

The user can also narrow the search to vendors containing a certain word within the name.

To obtain a list of vendors starting with a letter, type the letter in the description field and click on "Search."

- For example, typing "M" will display all vendors beginning with "M."

To obtain a list of vendors that contain a specific word in their title, enter in the "Description" field a "%" sign (no quotes) and the word. Click on the "Search" button.

- For example, in the "Description" field, enter a "%" sign and the acronym USDA, e.g., %USDA. Vendors containing the word "USDA" within the name will display.

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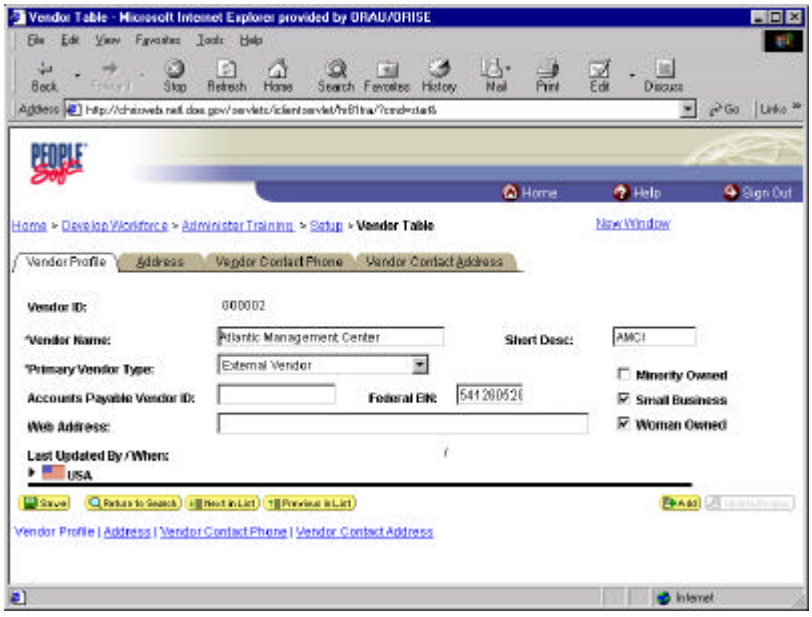
7. Click on the appropriate vendor.



The "Vendor Table" is displayed.

Verify that this is the CORRECT vendor/location by reviewing the displayed information.

8. Click on the "Address" tab and verify the information displayed.

9. Click on the "Vendor Contact Phone" tab and verify the information displayed.

10. Click on the "Vendor Contact Address" tab and verify the information displayed.

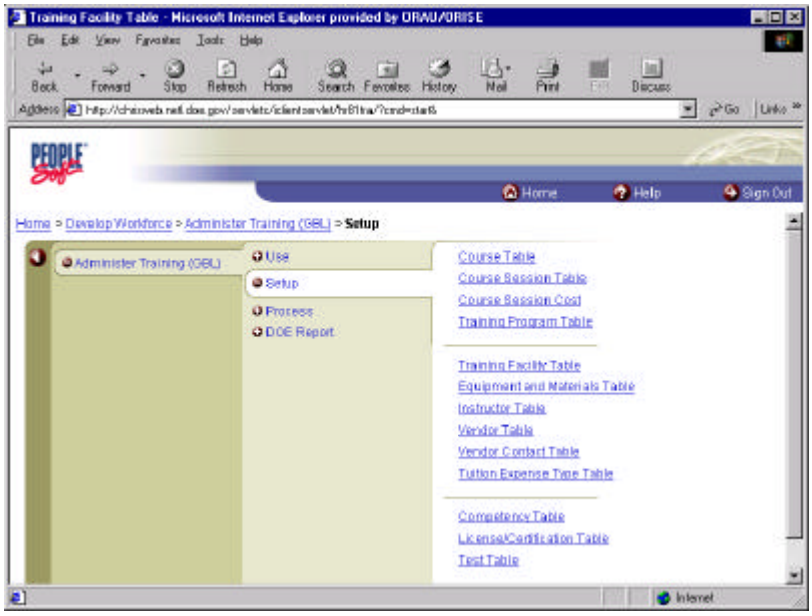
Note: To add a vendor, click on the "Add" button and proceed to step 5 in the Adding a Vendor section below.

Adding a Vendor

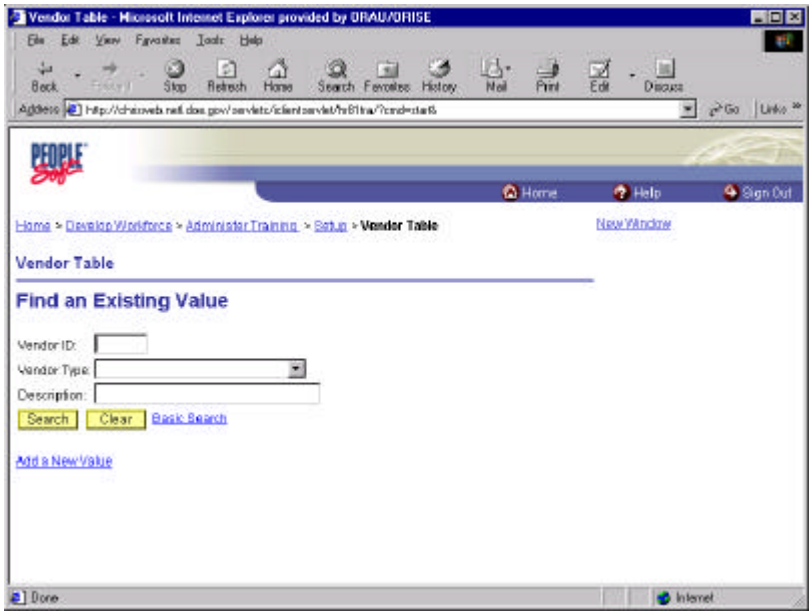
If the vendor for a course session is not found, it must be added to the CHRIS "Vendor Table." Level 2 and 3 users can enter a new vendor.

To add a vendor to CHRIS:

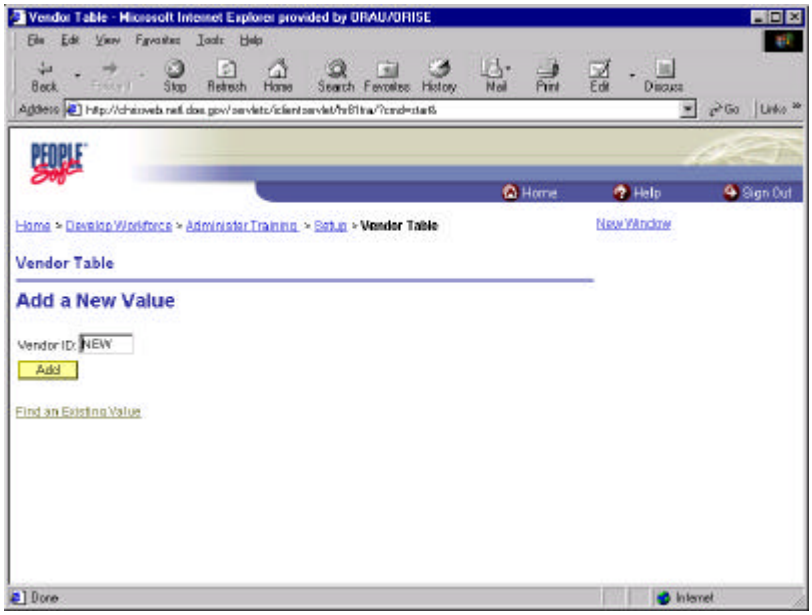
1. At the "Home" screen, click on "Develop Workforce."
2. Click on "Administer Training (GBL)."
3. Click on "Setup."
4. Click on "Vendor Table."



The "Vendor Table" screen is displayed.

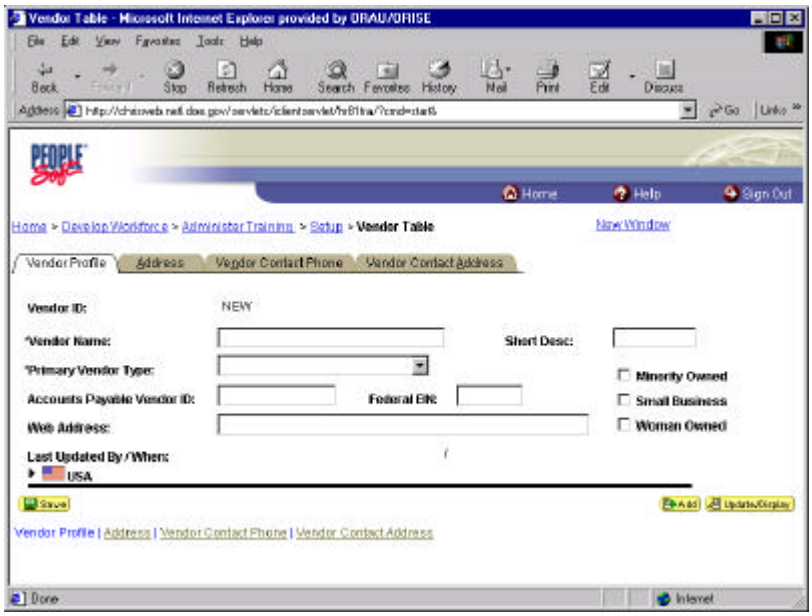


5. Click on "Add a New Value."



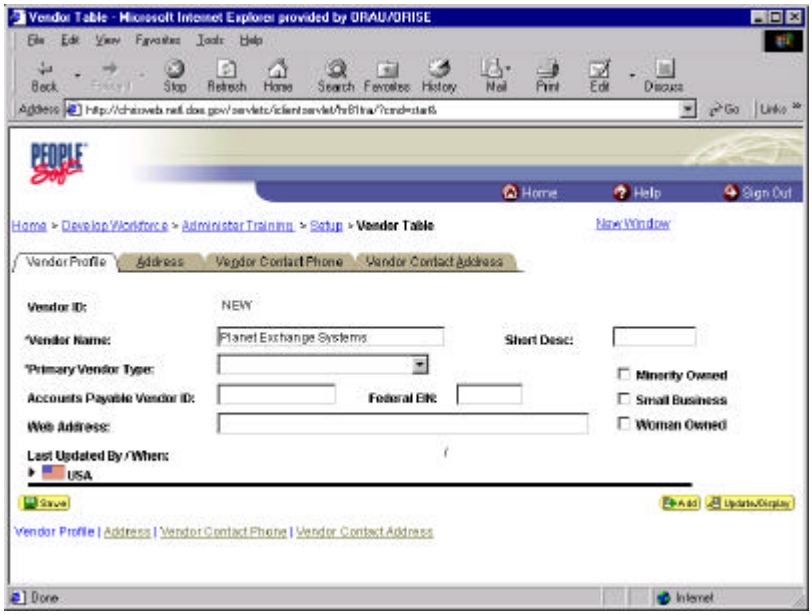
The "Vendor Table" screen is displayed with "New" displayed in the "Vendor ID" field.

6. Click on the "Add" button.



The "Vendor Profile" screen is displayed.

7. Enter the vendor's name at the "Vendor Name" field.

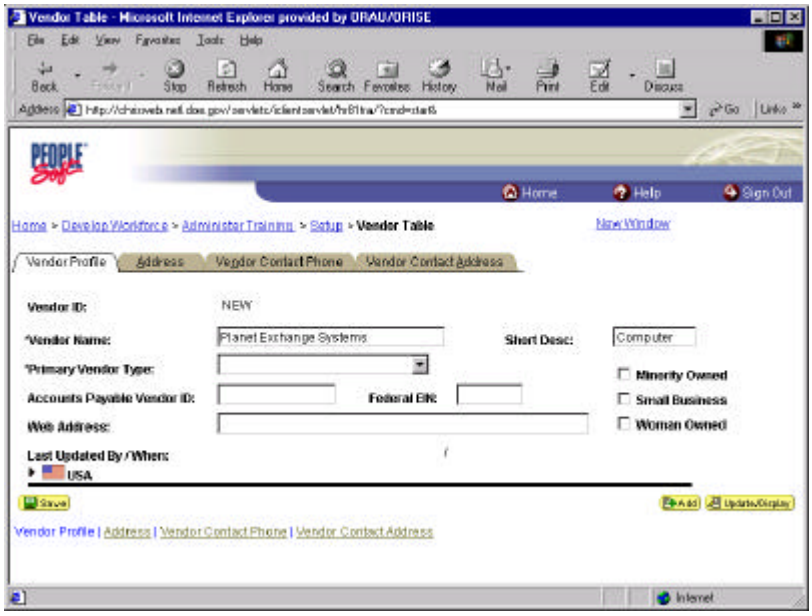


8. Press the "Tab" key.

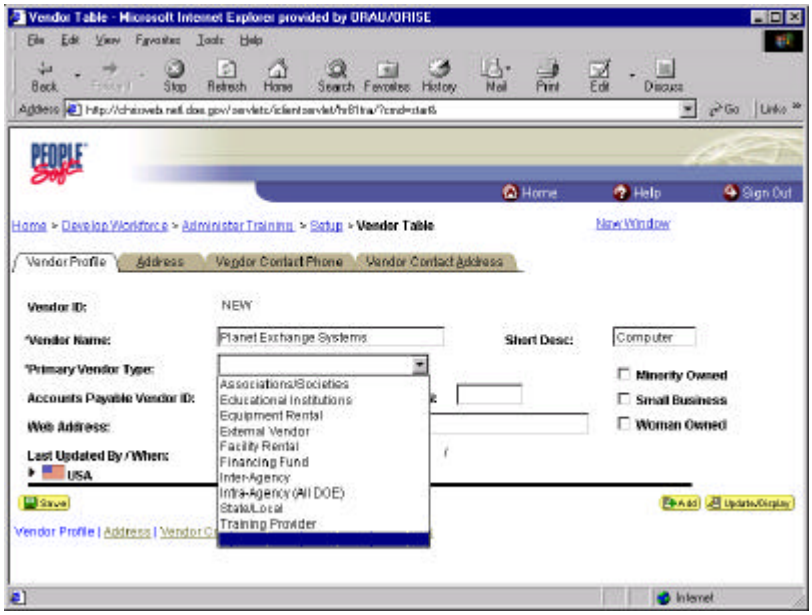
   The cursor will move to the "Short Desc" field.

9. Enter a short description, up to 10 characters.

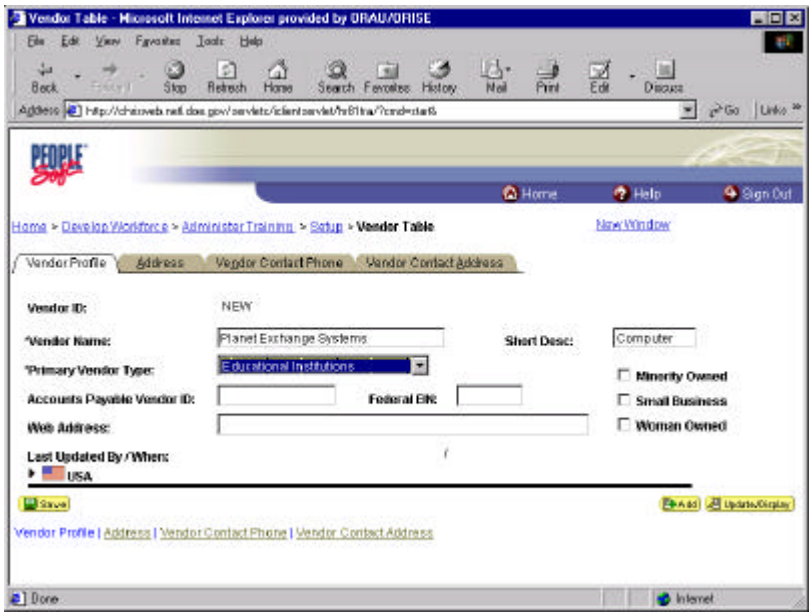
10. Press "Tab" to move to the "Primary Vendor Type" field.



11. Click on the down arrow to display a list of vendor types.



12. Click on the appropriate type.



13. Press the "Tab" key.

14. Click in the "Minority Owned" box if the business vendor is minority owned. If it is a designated small business, or woman owned, check these boxes. More than one choice may be selected.

15. Press the "Tab" key.

16. Enter the vendor's electronic banking ID #, at the "Accounts Payable Vendor ID" field or skip this field.

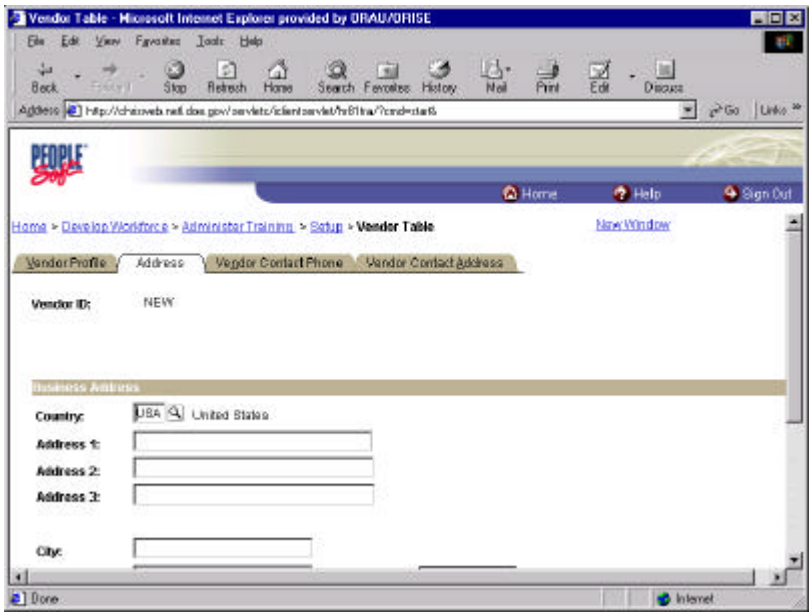
17. Press the "Tab" key.

18. Enter the vendor's Employee Identification Number (EIN), also known as the Taxpayer Identification, at the "Federal EIN" field.

19. Press the "Tab" key.

20. Enter the Web address in the "Web Address" field.

21. Click on the "Address" Tab.



22. Enter the business addresses.

    Note: Press the "Tab" key to move among the fields.

    A large box is provided for additional comments.

Vendor Comments

BUSINESS RULE

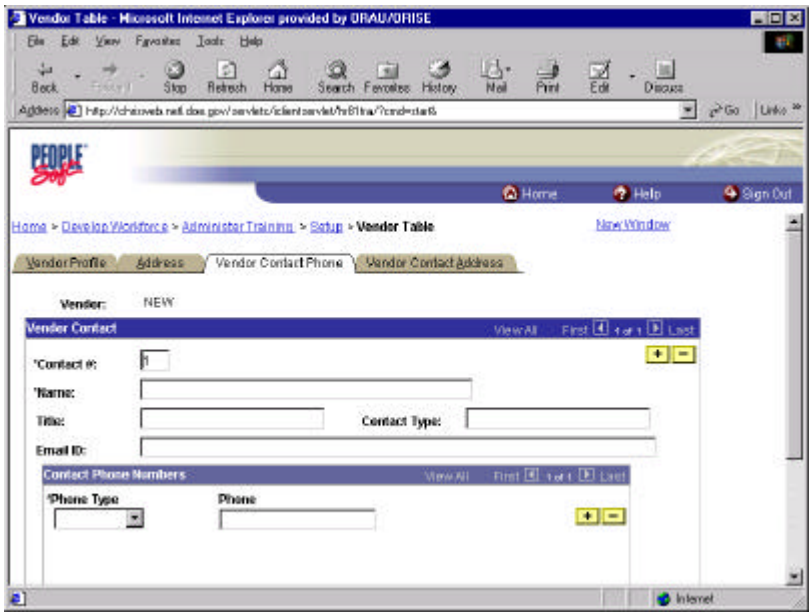
Use the "comments" section to list other training areas the vendor can provide.

Entering Vendor Contact Information

The "Vendor Contact Phone" screen is used to enter local representatives and their phone numbers.

Vendor contact information is added as follows:

1. Click on the "Vendor Contact Phone" tab.



The "Vendor Contact Phone" screen is displayed.

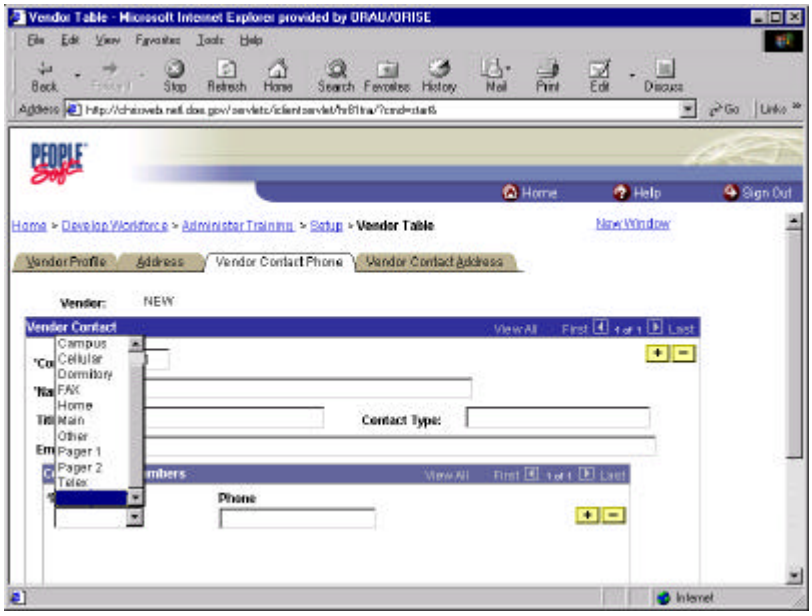
2. Press the "Tab" key to move from field to field as you enter the required information.

3. Click on the + to add multiple contacts.

   Adding a contact will automatically change the next contact number to #2 and higher as contacts are added.

4. Tab to the "Phone Type" field.

5. Click on the down arrow to display a list of phone types.

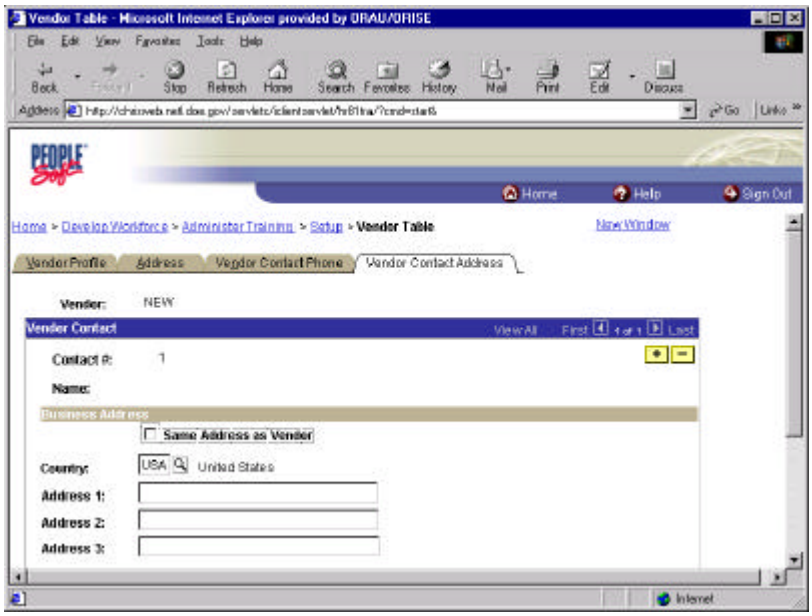


6. Select the appropriate type of phone.

7. Tab to the "Phone Field." The phone number convention is code/prefix-suffix. For example: 423/555-5555.

   Note: You can add rows for multiple phone numbers by inserting a row, then clicking on the down arrow to identify the next phone number type, and then tabbing to the "number" field and entering the number.

8. Click on the "Vendor Contact Address" tab.



The "Vendor Contact Address" screen is displayed.

9. Press the "Tab" key to move from field to field as you enter the required information, or click on a box by "Same Address as Vendor." The information will self-populate.

10. Click on the "Save" icon.

Note: Once you have saved, CHRIS assigns the next sequential number to the vendor. (See Vendor ID at the top of the page.)